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TRAINING SURVEY

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Abstract: PURPOSE

End-user education and training are critical to a successful implementation of the HANDI 2000 Project. An Education Profile (training survey) determines how best to accomplish this by: acquiring and analyzing data affecting the education process. Assessing overall user training needs and training component issues. Developing a training delivery strategy specifically tailored to Project Hanford...

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Release Approval

Date

Release Stamp

Y.L. Burkland 8/25/98

Approved For Public Release

TRAINING SURVEY

Educational Profile for Hanford HANDI 2000 Project

TRAINING SURVEY

Educational Profile for
Hanford HANDI 2000 Project

HNF-2972, Rev. 0
JUNE 1998

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INTRODUCTION

Fluor Daniel Hanford, Inc. (FDH) is currently adopting streamlined business processes through integrated software solutions. Replacing the legacy software (current/replacement systems, attached) also avoids significant maintenance required to resolve Year 2000 issues. This initiative is being referred to as 'HANDI 2000'

The software being implemented in the first phase of this project includes Indus International's *PASSPORT Software Solutions*®, Peoplesoft and Primavera P3 Software. The project, which encompasses all the system replacements that will occur, has been named 'HANDI 2000.'

The PASSPORT applications being implemented are Inventory Management, Purchasing, Contract Management, Accounts Payable, and MSDS (Material Safety Data Sheets).

The PeopleSoft applications being implemented are General Ledger, Project Costing/Budgeting, and Payroll/Human Resources.

The Primavera P3 Software will be used as a scheduling and performance measurement tool.

In conjunction with HANDI 2000, FDH is implementing a new Hanford Business Structure (HBS) which affects current project accounting practices. This new framework allows FDH to integrate technical, schedule and project baselines to better track and analyze the work being performed at Hanford. While this change is not directly tied to the software, it does have a significant reengineering and training impact.

The Hanford Site is comprised of multiple companies. FDH is the integrating contractor with a number of major subcontractors (MSCs) under the Project Hanford Management Contract or PHMC. Each company acts as an independent operating company under contract to FDH. FDH, DynCorp, and the major subcontractor employees will be the primary group affected by the initial software implementations.

Many of the business functions for Project Hanford are performed centrally by FDH, in its role as the integrating contractor. These functions include Payroll, Human Resources, Accounts Payable, Project Costing and General Ledger.

All of the companies are impacted by the new HBS, primarily in their accounting and project management practices.

The MSC's will experience system and business changes in the areas of the new HBS, MSDS entry and lookup, purchase order requisitioning, contract requisitioning, chemical and general supplies, inventory management, report viewing and the new automated approval processes that will replace current manual processes. All applications have a planned implementation date of October 1, 1998 (the beginning of the fiscal year 1999).

For each of the major modules, a project lead has been established to provide overall direction for the module and to define initial training needs. The project leads are defined as follow:

Chris Hopkins – Supply Management

Paul Felts – Finance

Jim Fish – P3

Pam Edwards – HR/Benefits/Payroll

Terry Noland – Environment, Safety and Health (MSDS)

Mike Stephenson – Chemical Inventory Management

An initial Education Profile was conducted at Hanford on March 24, 1998 by Ms. Maria Hyman, Education Lead of Indus International Western Region in conjunction with Ms. DeVon Larson, Training Coordinator for the HANDI 2000 project. An overall general training survey was delivered. After verification and modification, this document now reflects Project Hanford specific training needs.

This training survey is intended to define the requirements of 'what' and 'who' needs to be trained as well as 'where' the training will occur. The follow-on training plan will define 'how' and 'when' the training will take place (Computer- based training [CBT], custom courseware, etc.).

EDUCATION PROFILE

The Education Profile captures a point-in-time high-level profile of the user community who will require training. The focus of the education profile deals with end-user training. It is assumed that the majority of the technical training is covered in the Project Infrastructure budget and takes place offsite.

To ascertain training needs, a number of factors must be considered including;

- 1) Population by job function
- 2) Availability of training facilities
- 3) Determination of instructor resources
- 4) Requirements dictated by adopted site training methods
- 5) Strategies for training delivery including Train-the-Trainer, CBT, INDUS CO-PILOT or use of third-party organizations
- 6) Briefings that outline roles and responsibilities and workflow changes.

This Education Profile or 'Training Survey' represents the first phase in the development of the comprehensive Education Plan, which reflects the training and education strategy to be used by Project Hanford, including tasks, assignments, schedules, and budget considerations.

PURPOSE

End-user education and training are critical to a successful implementation of the HANDI 2000 Project.

An Education Profile (training survey) determines how best to accomplish this by:

- ☐ Acquiring and analyzing data affecting the education process.
- ☐ Assessing overall user training needs and training component issues.
- ☐ Developing a training delivery strategy specifically tailored to Project Hanford needs and resources – Who, What, Where, When, and How to train end-users based on the data analyzed during this Education Profile process.

Education planning is an evolutionary process that requires review and enhancement during and after the project implementation. This survey is the initial attempt to pinpoint tasks and assignments specific to HANDI 2000.

The Education Plan plays a critical role in communicating project goals to a diverse audience across Project Hanford ensuring that company personnel are qualified to perform their assigned duties using PASSPORT, Peoplesoft, and P3 applications.

SCOPE

This Education Profile describes the training and education planning process. This document encompasses the education evaluation for the October 1998 roll-out of the integrated PASSPORT, PeopleSoft, and P3 applications at Project Hanford. It is meant to define the scope of the training roll-out in terms of class curriculum, numbers of students and equipment and facility requirements. The primary focus of the training is on the software end-users. Some generic technical training has been defined but these classes are assumed to be offsite classes and will not impact the end-user training.

GOALS AND OBJECTIVES

The intent of the HANDI 2000 Integrated Education Profile is to identify application and technical training requirements, to ensure appropriate resources are available to carry out assigned functions, and to provide time estimates to develop and implement a comprehensive training program.

The following goals and objectives are to be met:

- ☐ Identify training resources, facilities, end-users, and course curriculums.
- ☐ Implement training/briefing requirements to reflect the outcomes of Business Process Improvement (BPI) sessions.
- ☐ Define course curriculums to meet training requirements.
- ☐ Identify prerequisite training requirements (e.g., desktop skills) for instructors and users.
- ☐ Identify training lead/coordinator's roles and responsibilities.
- ☐ Identify training delivery strategies such as Train-the-Trainer and Power User training versus Casual End-User training.
- ☐ Determine the applicability of computer-based, interactive, training.
- ☐ Identify technical training requirements, application development tools, client/server, and system administration courses to be attended by Project Hanford's technical staff.
- ☐ Develop curriculum requirements for finite 'product orientation' training, as well as ongoing training.
- ☐ Determine the method of tracking training activities.
- ☐ Evaluate and validate that training course was effective.

TRAINING METHODS

Five basic training methods will be used for training end users. Each method is appropriate under circumstances outlined below:

1) **Method:** **Train-the-Trainer**

Trainers train Hanford instructors who in turn train other end-users. Courseware may be customized for particular job functions.

The Train-the-Trainer method is recommended when large groups of people (>30) require training on a specific product. It is also recommended when only portions of the courseware (not the entire class) are applicable to certain groups. One example would be the training of the material requisitioners.

2) **Method:** **External Trainers**

External trainers are brought onsite to train using their standard non-customized training courseware.

External trainers training onsite will be used when smaller groups of people (<30) require training on a specific product. When the courseware does not have to be customized, the use of external trainers over the train the trainer approach will optimize the use of internal training resources.

3) **Method:** **Offsite Courses**

External trainers train at their chosen locations using their standard non-customized training courseware.

Offsite courses are preferred when only a few employees require a specific class or when pre-requisite training is required and not included as part of the HANDI 2000 curriculum technical courses.

4) **Method:** **Computer-Based Training (CBT's)**

CBT's are an option for training large groups when pre-requisite training or basic training is required and not included as part of the standard HANDI 2000 curriculum (Windows 95 or Portal 97 basics for example).

5) **Method:** Custom INDUS International Tools

CoPilot - an electronic job aid to help the user accomplish a PASSPORT task through a dialog with the user.

Atlas - an interactive tool that helps users understand an organization's workflow and its relationship to the PASSPORT system.

These tools are available for training large groups. They are CBT's customized to reflect Project Hanford data. It is unclear at this time whether or not INDUS currently allows end-users to customize these products or how difficult customization is. These tools will be evaluated for specialized training for large audiences. If they are not easily customizable they will probably not be selected.

End-User Training Definition

Training classes are broken down into functional segments within the courseware. End-user job functions are categorized and matched against these functional segments. To ensure that each job function receives the right amount of training, a recommended curriculum has been developed in the form of Education Tracks.

Once each track and intended audience has been identified, the duration of the course is defined based upon the curriculum objectives and course content. The resulting number of tracks, associated course duration, along with the anticipated number of class sessions required, are used to calculate the total number of instruction days for planning purposes.

Training Assumptions

Assumptions in calculating sessions and training days are:

1. All users are expected to have a basic working knowledge of Windows 95 before participating in the HANDI 2000 Training.
2. Many classes will include pre-requisite briefings covering Business Process Changes pertinent to an application.
3. Ten (10) participants are normally assumed for each "hands-on" computer based class session.
4. Twenty five (25) participants are normally assumed for each briefing.
5. A typical training day is eight (8) hours of actual instruction time.
6. End Users are categorized into three main groups with specific training and machine requirements:
7. Cost of the time a student spends in training is paid by their company not by HANDI 2000.

User Type	Power Users	Periodic Users	Casual Users
Description	Personnel utilizing PassPort or Peoplesoft applications to Accomplish their daily work. These individuals will be trained on a priority basis and are required to be trained prior to the October 1, 1998 implementation date. This class of user requires a high-end hardware configuration.	Personnel who may require PassPort or Peoplesoft applications to do Some of their work but not necessary on a daily basis. These individuals may require Formal training or may be trained on-the-job by the department application POWER USER. This class of user typically requires a high-end hardware configuration.	Personnel who may require PassPort or Peoplesoft applications on an occasional basis. These individuals will be trained on-the-job by the department application POWER USER. This class of user would not typically require a high-end hardware configuration.
Hardware Equipment	Pentium 200 Processor, 32 MB RAM, 100 MB Available Disk Space, Windows 95	Pentium 200 Processor, 32 MB RAM, 100 MB Available Disk Space, Windows 95	Pentium 100 Processor, 32 MB RAM, 60 MB Available Disk Space, Windows 95

The preliminary Hanford Training Survey end-user community matrices identify approximately 4,000 users requiring some level of PASSPORT and/or PeopleSoft application training. These lists will be validated by each of the companies in addition to defining the category (power, periodic, casual) of each user.

These groupings do not necessarily correspond to the work organization divisions at Project Hanford. Management-level personnel might be priority, periodic, or casual users depending upon their need to access the system.

According to research, approximately 1000 core users have been identified, with 244 days necessary to complete training. There have also been approximately 2500 casual users identified, who will require 50 days training that will occur after October 1st.

As soon as actual training needs are defined, Indus International, and PeopleSoft training personnel will be contacted to schedule training resources for Hanford's classes.

TRAINING SURVEY SUMMARY TABLE

	Class Name	Class Duration (Days)	Total Number of Users	Number of Internal/External Classes	Total Number Of Classes	Total Class Days Required	Training Delivery
PassPort	Contracts	2	10	1	1	2	T3 by INDUS
	CON-001	1	142	15	15	15	Internal-TBD
	CON-002	5	198	20	20	10	Internal-TBD
	CON-003	1	5	1	1	1	Internal-TBD
	CON-004	2	10	1	1	2	Internal-TBD
	CON-005	1	187	19	19	19	Internal-TBD
	Purchasing	5	10	1	1	5	T3 by INDUS
	General-001	.5	236	24	24	12	Internal-TBD
	PUR-001	.5	171	17	17	8.5	Internal-TBD
	PUR-002	.5	205	21	21	10.5	Internal-TBD
	PUR-003	5	80	8	8	40	Internal-TBD
	PUR-004	.5	20	2	2	1	Internal-TBD
	PUR-005	.5	106	11	11	5.5	Internal-TBD
	Inventory	8	20	2	2	16	T3 by INDUS
	INV-001	8	21	2	2	16	Internal-TBD
	INV-002	5	43	5	5	25	Internal-TBD
	INV-003	4	33	4	4	16	Internal-TBD
	INV-004	7	44	5	5	35	Internal-TBD
	MSDS	3	1	1	1	3	INDUS
	A/P	2	20	2	2	4	INDUS
	PASSPORT 1	.5	5000	100	100	50	Internal-TBD
	subTOTAL		6562	262	262	296.5	
	Finance						
	FIN-001	.5	300	1	1	5	INTERNAL-TBD
	FIN-002	.5	300	12	12	6	INTERNAL-TBD
	FIN-003	1	150	13	13	13	INTERNAL-TBD
PeopleSoft	Payroll	4	20	2	2	8	PS
	Benefits	4	20	2	2	8	PS
	H/R	4	20	2	2	8	PS
	Project Costing	4					PS
	General Ledger	4					PS
	Tech Query & Reports	4	40	4	4	16	PS
TOTAL			7412	298	298	356	

Summary of Recommendations for HANDI 2000 Training Delivery

Strategy:

1. Instruction Days:

Power User Training	244 training days
Large Audience Briefings/Classes	53 training days

2. Instructor Resources:

A combination of training personnel have been defined per education track

PASSPORT Trainers will conduct specified T3 (Train-the-Trainer) classes for the following:

Contract Management Inventory Management Purchasing

PeopleSoft Trainers will conduct the specified PeopleSoft classes.

Subject Matter Experts will conduct internal briefings where informal communication forums are defined.

Hanford personnel will conduct the Education tracks where the recommended training/briefing delivery is via Client Trainers.

3. Facility:

Course training rooms are currently located in Building 1163 at 2355 Stevens, at 1981 Snyder and at Building 2750 in the 200 East Area. Room numbers at the 1163 building are 375, 420 and 272-273-274. The majority of the classes will be scheduled for the 1163 building.

4. Schedule:

Indus International recommends that a target of >50% of the Hanford project user community receive system training approximately four (4) weeks prior to 'going live'.

The focus of the FY98 training group consists primarily of Power Users. Nine weeks of training will actually occur because the

number of Power Users who require training exceeds the six training facilities currently available. The majority of the remaining user community is of casual users who can be trained in the weeks following implementation.

The Train-the-Trainer classes will take place in June in order to give the client trainers ample time to develop courseware and course lesson plans.

PeopleSoft training will be conducted by PeopleSoft trainers at the Hanford Site or for smaller classes, the training may occur offsite. Payroll, Benefits and Human Resource training may be completed in June because the implementation is targeted for July.

Casual User Instruction:

There are two (2) briefings that have been designed as application classes for the (2,500+) casual end-users:

PASSPORT 1 – Catalog Searches, Initiating new Items, Contract Requirements, System Basics, AAAs, Code of Accounts, and MSDS viewing and printing.

GEN-001 – Overview of HBS, Training in Material Requests, Catalog Searches, Initiating New Items, and Contract Requirements.

Based on the cost and complexity, CBTs classes may be supplemented by the use of such job aids as PASSPORT'S PORTAL/97 System Basics CBT. Windows 95 knowledge is an assumed pre-requisite and will not be covered in this curriculum.

Business Change Briefings, specific to each business area will be conducted by the trainers or by various Subject Matter Experts. Business change briefings will be incorporated into courses.

Large audience rooms can be utilized for these presentations of the new business processes to be utilized at the Hanford Site.

Four additional technical courses yet to be named will be conducted offsite and are factored into the training budget.

Training Component Issues

In this section, we address the various training components that are part of a comprehensive training delivery strategy:

- ☐ Hanford Training Center Requirements
- ☐ Instructors
- ☐ Training facility requirements
- ☐ User prerequisites
- ☐ Course presentation
- ☐ Courseware
- ☐ Learning Tools/Job Aids - CBT, CoPilot, Atlas, QUICKCARDS
- ☐ Technical training needs
- ☐ HANDI PATROL and Help Desk
- ☐ Role of the Training Coordinator
- ☐ Post-implementation review.

HANFORD TRAINING CENTER REQUIREMENTS

In order to meet PHMC and DOE training requirements, a Systematic Approach to Training (SAT) method is being used.

The goal of the SAT method is to ensure training quality standards are met for the PHMC. This procedure is outlined in the HNF-PRO-167, 'Using the SAT Model for Training.'

In addition to the routine compliance with SAT procedures, the DOE Office of Training will evaluate PHMC training performance in three specific areas: analysis, evaluation, and instructor qualification.

Analysis

Analysis is governed by HNF-PRO-170, 'Analyzing Training Requirements.' To obtain course numbers for recording completions, training providers must submit an analysis report for each course, providing justification for instituting these training courses.

Evaluation

Evaluating training is governed by HNF-PRO-174, 'Evaluating Training.' This consists of periodic reviews of training materials and methods in order to get feedback about the effectiveness of the training programs. This evaluation provides reasonable assurance that training courses are producing competent employees capable of performing efficiently and safely.

Instructor Qualification

Instructor qualifications are governed by HNF-PRO-178, 'Qualifying Instructional Staff,' and HNF-PRO-118, 'Instructional Staff Training and Qualification.' These procedures ensure that instructional staff meet the SAT Model stipulations, including qualification and presentation of training.

INSTRUCTORS

Hanford power users who may be members of the project team and who actively participated in the Business Process Improvement (BPI) sessions, may already possess significant system and business expertise. They are the Subject Matter Experts for the various applications. Their skills will be used to support the tailoring of courseware and creation and deliver of "business change" presentations. The Hanford Technical Center, training resources will be used to qualify internal instructors and contract instructors, as required.

Indus International's senior training specialists will be utilized for pre-BPI training, end-user training, and Train-the-trainer courses. Train-the-trainer classes instruct personnel in how to use the application and incorporate business flows in actual training. It also includes training techniques, presentation skills, and audience management skills, teaching how to best present PASSPORT concepts easily and effectively.

TRAINING FACILITY REQUIREMENTS

The HANDI 2000 project will assume responsibility for facility/equipment set-up and scheduling, training region preparation and stabilization, and courseware reproduction. Each student should have a dedicated workstation during hands-on courses.

In addition, the following guidelines will be taken into consideration as Hanford prepares its HANDI 2000 training facilities:

- PORTAL/97 workstations are required for each student, plus an instructor machine.
- Training room configuration includes the following: overhead projector, white board, flip chart, and an overhead projection unit (LCD panel) or large monitor for instructor terminal display. (Please refer to the *Suggested Training Facility Layout* illustration on the following page.)
- Dedicated, stable training environment and local printer access.
- Following all end-user-training, users should have access to a practice-training region where they can practice their newly acquired skills without fear of 'breaking' the system. This will help bridge the gap between training and the time the users actually begin to use the 'live' system.

SUGGESTED TRAINING FACILITY LAYOUT

USER PREREQUISITES

Prior to participating in any PASSPORT or PeopleSoft workshop, students must be familiar with computer keyboards, mouse operation, and basic data input concepts. For PORTAL/97 an operational knowledge of the *Windows 95* environment is a prerequisite.

The Hanford Technical Training Center standards will be followed for course creation, evaluation and for capturing project-training records.

COURSE PRESENTATION

During PASSPORT Train-the-Trainer and end-user workshops, instructors present topics using a variety of methods which may include some or all of the following techniques:

- ❑ Instructor-led lectures and discussions where the instructor will present conceptual or procedural information using overheads, slides, and flip charts. Sometimes, the instructor may call upon students to help illustrate key points and to make a quick assessment of how comfortable they are with new concepts.
- ❑ Guided tours where the instructor “walks” students through a function or series of functions on the system. Sometimes this tour will be performed on the instructor’s monitor while attendees watch. At other times, the instructor may ask students to perform these functions while he/she presents them.
- ❑ Hands-on and self-paced activities where students get to try out their newly acquired skills at their own pace. They may practice with the written exercises contained in their student workbooks or they may wander through the system on their own. The instructor is available to offer answers that may come up as students explore.

Upon completion of all lectures, demonstrations, and hands-on activities, students will have a practical understanding of PASSPORT’S basic features, including panel layout, navigation, function key/icon use, and accessing on-line help.

PassPort COURSEWARE/TRAINING MATERIALS

Baseline PASSPORT courseware – Student Workbooks and Instructor Kits are available for end-user training activities for a license fee*. This license fee entitles Hanford to full and unlimited use of the baseline PASSPORT courseware within the Hanford organization. The *Student Workbooks* consist of:

- ☐ Title Page
- ☐ Table of Contents
- ☐ Introduction Unit
- ☐ Unit Overview and Learning Objectives
- ☐ Application Panels and Panel Descriptions
- ☐ Hands-On Activities
- ☐ Graphics to illustrate key concepts and process flows
- ☐ Practice Scenarios to summarize lessons.

PASSPORT courseware will be licensed for the Contracts, Purchasing and Inventory Modules. For licensed courseware, Hanford will be provided with a hard-copy original for duplication purposes, and an electronic version in *Microsoft Word 7.0 (Windows95)* with *Macromedia Freehand* graphics. Once BPI topics and workflows have been identified and developed, the baseline courseware will be embellished with company-specific workflows, training scenarios and terminology to be taught to end-users.

For Train-the-Trainer classes, Hanford will receive a single (1) set of training aids, referred to as an 'Instructor Kit,' specially packaged for use during end-user training sessions and on-going training requirements. These kits provide each member of a customer's training team with the 'tools of the trade' necessary to effectively conduct a PASSPORT course. All kits include System Basics, related Data Module/System Administration, and application-specific materials (transparencies, handout hard copies, etc). Additional Instructor Kits are available for purchase, if desired.

INTERACTIVE LEARNING TOOLS (COMPUTER-BASED TRAINING) AND JOB AIDS

Indus International has developed several types of job aids that can be utilized to further aid in the education and training of the end-user:

- ☐ System Basics PORTAL/97 CBT (computer-based-training).
- ☐ CoPilot - an electronic job aid to help the user accomplish a PASSPORT task through a dialog with the user.
- ☐ Atlas - an interactive tool that helps users understand an organization's workflow and its relationship to the PASSPORT system.
- ☐ QuickCards - easy-to-follow instructions for various applications processes.

Specific solutions will be developed in the training plan for course material.

System Basics PORTAL/97 CBT

This is a computer-based learning tool designed to walk the user through a typical PASSPORT panel, demonstrating navigation and functionality within PASSPORT. This can be used as a prerequisite to a PASSPORT application class. The user merely follows the directions on the screen, thus familiarizing themselves with the basics of PASSPORT functionality.

HANDI Patrol & HELP DESK

It is critical that HANDI 2000 address the area of end-user support to ensure that the appropriate staff is trained on Hanford's business flows and the PASSPORT applications. Additional support for the end-user community once in production is often addressed using a 'roaming help desk' model referred to as the PASSPORT PATROL. In this integrated implementation, a PeopleSoft Patrol would also be required; perhaps an integrated group termed the HANDI Patrol. The names and phone numbers of these individuals should be given to end-users during training.

It is important that users feel confident that there is someone they can access easily and quickly when they need help. A mechanism for logging and tracking help desk calls should also be implemented prior to delivery of key user and end-user training. Procedures should be defined and widely communicated during these sessions.

A strategy for the HANDI Patrol and a help desk solution remains to be defined by Hanford, as well as the related training (both application and technical) that these individuals will require as members of the project technical support team. Normally, the PATROL consists of power users (i.e., Subject Matter Experts) who have attended the BPI sessions and may also be instructors of those specific applications. They can normally ascertain whether the problem is an application-specific problem or a technical problem, and can aid the help desk in filtering questions/problems and routing them to the appropriate person for solution.

Computer Technical Support (CTS) will also be trained as part of the end-user training in order to help field questions and provide support. They will also route any calls for support to the appropriate group.

ROLE OF PassPort TRAINING COORDINATOR

Project Training Coordination is an integral part in the successful deployment of an implementation program. This full-time, dedicated group is tasked with management and administrative duties that require the attention of very detailed individuals, who work well independently (i.e. takes initiative and ownership for the role). Excellent interaction skills, in addition to strong written and verbal skills are also required.

The Training Coordination responsibilities will include, but are not limited to, the following:

- ☐ Develop and Own the Overall Education Plan
- ☐ Purchase and Deploy Courseware and Training Materials
- ☐ Schedules Courses/Coordinates Facility
- ☐ Prepare Training Facilities
- ☐ Support Ongoing Training Activities.

Development & Ownership of the Overall Education Plan

- ☐ Work with project team members and PASSPORT/PeopleSoft representative(s) to develop a comprehensive Education Plan that encompasses development of user profiles, associated curriculums, and tailored courseware/job aids; identification and delivery of required prerequisite training; and, delivery management of all technical and end-user training programs.
- ☐ Work within Hanford's infrastructure to establish a mechanism for scheduling training of the end-user community. Most training will be conducted in a formal training environment, but provisions for alternative methods of training delivery (e.g., on-the-job training, self-paced learning using CoPilot, etc.), must also be considered.

Courseware and Training Materials

- ☐ If customized courseware is to be utilized, work with the courseware developers to ensure that training materials are tailored/developed to meet the milestones of the Education Plan, based on the output of the BPI sessions. This will include developing company-specific workflows, business procedures, best practices, training scenarios, and terminology to be taught to end-users.
- ☐ Maintain courseware and related training material master library.
- ☐ Manage courseware/training materials inventories and distribution based on course schedules.
- ☐ Place/expedite reproduction orders as needed and monitor quality.
- ☐ Manage reproduction costs and budget, as required.

Course/Facility Scheduling

- ☐ Coordinate with managers and users to maintain up-to-the-minute course schedules, including instructor resources, classrooms, and coordination/reproduction of courseware, and classroom equipment (including workstations).
- ☐ Participant registration and confirmation.
- ☐ Develop and maintain a list of class attendees by job function and the specific training "profile" each user requires.
- ☐ Identify and manage any additional training required by attendees prior to training (i.e., prerequisite training such as desktop skills).
- ☐ Contact managers and users to confirm participation for registered courses. (Confirmation via telephone, e-mail, or interoffice mail, etc.)

- ☐ Determine if rotating shifts or unusual schedules are to be taken into consideration.
- ☐ Track attendance and ensure Human Resources is notified of student attendance, if required.

Training Facility Preparation

- ☐ Verify availability of PASSPORT training facilities and ensure there are sufficient student training IDs.
- ☐ Confirm that training facility equipment, such as overhead projectors, projector screen, white boards, flip charts, extra projector light bulbs, etc. are available and operational.
- ☐ Verify stock of white board markers, flip charts, pads, etc., and ensure that the classroom is set-up properly and serviced prior to each class.

Ongoing Training Activities

- ☐ Monitor courseware/training materials and classes for continuous improvement.
- ☐ Manage ongoing PASSPORT training requirements such as refresher or remedial training and new employee orientation.
- ☐ Oversee any additional training related to new versions and upgrades of PASSPORT and PeopleSoft.

POST-IMPLEMENTATION TRAINING REVIEW

In order to ascertain the effectiveness of HANDI 2000's overall education program, a formal review is recommended at fixed periods following the start of Project production to examine users' skills, system output, and work product.

A Training Review identifies areas of strength and weakness in a customer's on-going training program while there is still time to address issues and schedule additional or remedial training as deemed appropriate. Lessons learned during the overall HANDI 2000 implementation can also be used when rolling out future Hanford sitewide implementations.

The methods of assessment for this task include, but are not limited to scoring and evaluation methods, questionnaire(s), random interviews, interviews, and surveys of trainees' managers/supervisors. The help desk log should also be reviewed to determine which areas are receiving the most support and where additional training may be required. On going decisions continue to impact on Course Endusers.

- Availability of current systems for extraction or review of data after FY-98 conversion to the system upgrade.
- Information concerning additional CBT courses can be found on the upcoming Training Group Bulletin Board at the HANDI 2000 Web Site.
- Continue to watch the Web Site for additional CBT announcements and updates.

Appendices

- I Current Systems/Replacement Systems**
- II Needs Analysis**
- III Training Breakdown by Functional Group**
- IV Course Descriptions**

APPENDIX - I

CURRENT

FDS - Financial Data System

- Work Order Module
- Indirect Allocations
- Performance Module
- Budget Module
- Expense Master
- Capital Master
- General Ledger

ECS - Expense Commitment System

RLPS - RL Property System (FY-99)

PIDS - Purchasing Info Document System

WIMS - Warehouse Inventory Mgmt. System

HIP - Hanford Inventory Program

SCA - Systems Contracting Administration

EVC - Electronic Vendor Catalog

PRA - Payment Requestor Administration

GIC - General Inventory Catalog

GSH - General Supplies History

RPH - Purchasing History

APM - Accounts Payable Module

PSI - Property Sampling Inventory

HMID - Hazardous Material Inventory Database

WHR - Westinghouse Human Resources

REPLACEMENTS

General Ledger

Project Costing

Budget

Asset Management

Accounts Payable

Purchasing

Inventory Management

Contract Management

Billing & Receivables

Payroll/Benefits

MSDS

APPENDIX – II

Needs Analysis

A needs analysis determined that the current Legacy software will be replaced. As a result Legacy system users need to be trained in the new Indus and PeopleSoft software. This need is based on the fact that the current Legacy software will not be available (except for limited inquiry) after fiscal year 1998. The new reengineered business processes rely heavily on the Indus and PeopleSoft software. It is imperative that these users receive thorough training and guidance through the transition process.

Objective

The objective of these courses is to provide personnel with the training and guidance necessary to transition from the Legacy software to the new Indus and PeopleSoft software. In this training, personnel will receive guided tours of the system, hands-on exercises, evaluations from the instruction staff, and an understanding of the reengineered business processes. Upon completion of the classroom training, students will receive guidance from a select group of power users (HANDI Patrols) who will provide on-the-job training (support for users who have not yet received training) and answer any procedural questions to help insure a smooth transition to the new business processes.

Evaluation

Students will be evaluated throughout the learning process in many different methods. During the classroom phase of instruction, students will be evaluated through the use of hands-on exercises, instructor overview, question and answer sessions, and student feedback. The courses will be evaluated through feedback from instructors and students, lessons learned tables, managerial feedback, and through formal post-implementation reviews.

APPENDIX - III-A

Contracts and Purchasing Training Breakdown By Functional Group

FUNCTIONAL USER GROUP:	Requisitioners	Reviewers and Approvers	Buyers	Contract Administrators	Buyer Technical Reps
	Con - 001	Con - 002	Con - 003	Con - 004	Con - 005
Contract Administration					
Introduction	X	X	X	X	X
Setting Up Contract Data			X	X	X
Contract Requisitions	X	X	X	X	X
Requisition Backlog				X	
Request for Proposal				X	
Contract Processing		X		X	
Contract Amendments				X	
Payment Authorization				X	X
Management Reporting		X		X	X
* Managing AAA's	X	X		X	X

APPENDIX - III-A (continued)**Contracts and Purchasing Training Breakdown
By Functional Group**

FUNCTIONAL USER GROUP:	Office Support	Requisitioners	Reviewers and Approvers	Buyers	Contract Administrators	Buyer Technical Reps
Purchasing	Gen -001	Pur - 001	Pur - 002	Pur - 003	Pur - 004	Pur - 005
Introduction	X	X	X	X	X	X
Request For Vendor Evaluation		X		X	X	
Purchase Requisitions	X	X	X	X	X	X
Open Requisition Backlog				X		
Purchase Award Processing			X	X		
Purchase Orders				X		
Blanket Purchase Orders				X		
Auto Award Purchasing				X		
Expediting Purchase Orders				X		
PO Revisions and Cancellations		X		X		
Request for Quotation				X		
Recording Vendor Bid Responses				X		
Management Reporting	X		X	X		X
* Managing AAA's	X	X	X	X		X
An 'X' in the column defines the required training for the specified job function						
* Indicates that this material is not part of the standard INDUS Training Courseware but is a requirement.						

APPENDIX - III-B**Inventory Management Training Breakdown
By Functional Group**

	FUNCTIONAL USER GROUP	Inventory Mgmt Specialists	Warehouse Mgmt	QC Receiving Inspections	Chemical Inventory Specialist
Course:	Inventory Management	Inv - 001	Inv - 002	Inv - 003	Inv - 004
	System Basics Review	X	X	X	X
	System Administration Set-Up	X			X
	Standards & Procedures	X			X
	Master Catalog - View-Only		X	X	
	Master Catalog - Create/Update	X			X
	Warehouse Location Data	X	X		X
	Material Reservation - D208	X			
	Vendor Data - View-Only	X	X	X	X
	Vendor Data - Create/Update				
	Material Request	X	X	X	X
	New Item Initiation - D209	X		X	X
	Electronic Reorder Notice	X			
	Purchase Requisitions	X		X	X
	Receiving	X	X	X	X
	Over, Short, Damaged & Discrepant (OSD&D)	X	X	X	X
	QC Inspection/UTC Uniquely-Tracked Commodities	X	X	X	X
	Warehouse Distribution	X	X		X

APPENDIX – III-B (CONTINUED)**Inventory Management Training Breakdown
By Functional Group**

	FUNCTIONAL USER GROUP	Inventory Mgmt Specialists Warehouse Mgmt	QC Receiving Inspections	Chemical Inventory	
Course:	Inventory Management	Inv - 001	Inv - 002	Inv - 003	Inv - 004
	Stock Putaway – Quick Putaway	X	X		X
	Stock Putaway – Computer-Assisted	X	X		
	Pick Backlog – Pick Backlog Scheduling & Pick Upload	X	X		
	Pick Backlog – Staging Location Assignment & Stage Return	X	X		
	On-Demand Pick Request	X	X		X
	Pick Consolidation & Issue	X	X		X
	Parts/Tool Issue & Return	X	X	X	X
	Material Movement Within Warehouse	X	X		X
	Returns to Vendors	X	X	X	X
	Replenishments Min/Max Reorder Points	X			
	Cycle Counting	X	X		X
	Forecasting	X			
	Reporting & Analysis Tools	X	X	X	X
An 'X' in the column defines the required training for the specified job function.					

COURSE: PASS-001
PASSPORT 1 FOR PHMC EMPLOYEES
REVISION NUMBER 1.0
JULY 7, 1998

Purpose Statement

Provide information, references and skills necessary for people who on an infrequent basis order catalog items, and parts electronically. Includes ability to prepare a material request, locate catalog items, route a material request for approval and status outstanding requests.

Course Description

This briefing is designed to provide casual users with the information necessary to perform simple functions from within PassPort. This briefing includes, performing catalog searches, initiating new items, contract requirements, the system basics, AAA's, Hanford Business Structure (HBS), and MSDS printing and viewing.

Audience A typical WIMS electronic order entry person, secretary, clerk, maintenance engineer, etc. who orders JIT and catalog items.

Classroom Resources and Planning

Time: ~ 4 Hours/ .5 Days

Methods: Lecture and discussion, guided tours through system, hands-on/ self-paced activities.

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PassPort Student Workbook

Revision	Author	Date	Comments

COURSE: AP-001
PASSPORT ACCOUNTS PAYABLE
REV.1

Purpose Statement

The purpose of this course is to provide Accounts Payable personnel with the necessary skills to perform accounts payable, specific job functions in accordance with the new reengineered business processes and the new software system replacing the current Legacy software. An example of the current Legacy software being replaced, is APM – Accounts Payable Module.

Course Description

This course is designed to introduce Accounts Payable personnel to the new PassPort Business System and the processes necessary to perform all accounts payable functions in Passport. The purpose of this lesson is to provide Accounts Payable personnel an overview of: the system basics, invoices, payables, reconciliation, and all reporting/analysis tools necessary to manage accounts payable in conjunction with the Hanford Business Structure (HBS) supporting the Hanford Mission.

Audience

Core users responsible for the management, entry, and approval of accounts payable.

Classroom Resources and Planning

Time: ~ 16 Hours/2 Days

Methods: Lecture and discussion, Guided tours through system, hands-on/self-paced activities.

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PassPort Student Workbook

Revision	Author	Date	Comments

COURSE: CON-001
PASSPORT CONTRACT ADMINISTRATION FOR
REQUISITIONERS, REV. 1

Purpose Statement

Provide detailed information, references, skills and training for people who write complex requisitions for materials, equipment, services and task orders. Includes the ability to prepare a Contract Requisition, route for reviews and approvals, submit supporting documentation, status open orders, review proposal information and track requisition and order status.

Course Description

This course is designed to introduce Requisitioners to the new PassPort Business System and the processes necessary to perform basic contract administration functions in PassPort. This course is to provide Requisitioners with an overview of the system basics and contract requisitions. This lesson covers the basic requirements for generating a contract requisition in accordance with the Hanford Business Structure.

Audience

Power user who prepare statements of work, enter contract requisitions, statuses contracts for services, obtains reports, communicates with contract management and accounting regarding specifications, changes, and payments.

Classroom Resources and Planning

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Time: ~ 8 Hours/1 Day

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities.

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PassPort Student Workbook

Revision	Author	Date	Comments

COURSE: CON-002
**PASSPORT CONTRACT ADMINISTRATION FOR APPROVING
& REVIEWING MANAGEMENT, REV. 1**

Purpose Statement

Provide information, references and skills necessary for management and support personnel who will be reviewing and approving on-line documents, requisitions, purchase orders, services contracts and payments.

Course Description

This course is designed to introduce to Management, sitewide, the new PassPort Business System and the processes necessary to approve, review, and report from PassPort. This course is to provide Reviewing & Approving Management with an overview of the system basics, contract requisitions, contract processing, and all the reporting/analysis tools necessary to manage contract administration in conjunction with the Hanford Business Structure (HBS) supporting the Hanford Mission.

Audience

Most managers in the PHMC, who have signature authority to approve requisitions, authorize sole sources, review open workloads, and trace expenditures.

Classroom Resources and Planning

Time: ~ 12 Hours/1.5 Days

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities. **Equipment:** Workstation, InFocus, Student Folders, and Handouts

References: Indus International PassPort Student Workbook

Revision	Author	Date	Comments

COURSE: CON-003

PASSPORT CONTRACT ADMINISTRATION FOR BUYERS, REV. 1

Purpose Statement

Provide information, references and skills necessary for buyers and purchasing clerks to obtain quotations, prepare purchase orders, administer JIT orders, route documents for electronic approval, and track supplier performance.

Course Description

This course is designed to familiarize Buyers with the new PassPort Business System and the processes necessary to perform basic contract administration functions in PassPort. This course is to provide Buyers with an overview of: the system basics, the contract requisition process, and an introduction to the Hanford Business Structure. This lesson covers the basic requirements for generating a contract requisition in accordance with the Hanford Business Structure.

Audience

Buyers, and Purchasing Clerks who enter orders, process requisitions, make payments, and obtain reports, etc. Power users of all purchasing functions.

Classroom Resources and Planning

Time: ~ 8 Hours/1 Day

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities. **Equipment:** Workstation, InFocus, Student Folders, and Handouts

References: Indus International PassPort Student Workbook

Revision	Author	Date	Comments

COURSE: CON-004

PASSPORT CONTRACT ADMINISTRATION FOR CONTRACT ADMINISTRATORS, REV. 1

Purpose Statement

Provide information, references and skills necessary for Buyers and Contract Administrators to process contract requisitions and place contracts for services and task orders.

Course Description

This course is designed to familiarize Contract Administrators with the new PassPort Business System and the processes necessary to perform all contract administration functions in PassPort. This course is to provide Contract Administrators with an overview of: the system basics, contract requisitions, processing contracts, contract amendments, payment authorizations, and all the reporting/analysis tools necessary to perform the function contract administration in conjunction with the Hanford Business Structure supporting the Hanford Mission.

Audience

Buyers and Purchasing Clerks who also need to create and pay contracts. Power users of all contract functions and some purchasing functions.

Classroom Resources and Planning

Time: ~ 16 Hours/2 Days

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities.

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PassPort Student Workbook

Revision	Author	Date	Comments

COURSE: CON-005
PASSPORT CONTRACT ADMINISTRATION FOR BUYER
TECHNICAL REPRESENTATIVES, REV. 1

Purpose Statement

Provide information, references and skills necessary for field and user personnel who will act as BTUs for service contracts and task orders.

Course Description

This course is designed to introduce Buyer Technical Representatives, sitewide, to the new PassPort Business System and the processes necessary to generate a contract requisition in PassPort. This course is to provide Buyer Technical Representatives with an overview of the system basics, contract requisitions, and an introduction to the Hanford Business Structure (HBS) This lesson covers the basic requirements for generating a contract requisition in accordance with the Hanford Business Structure.

Audience

Primarily field personnel who will be reviewing statements of work, writing contract requisitions, and reviewing payment authorizations.

Classroom Resources and Planning

Time: ~ 8 Hours/1 Day

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities.

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PassPort Student Workbook

Revision	Author	Date	Comments

COURSE: INV-001
PASSPORT INVENTORY MANAGEMENT FOR INVENTORY
MANAGEMENT SPECIALISTS, REV. 1

Purpose Statement

The purpose of this course is to provide Inventory Management personnel with the necessary skills to perform inventory management specific job functions in accordance with the new reengineered business processes and the new software system replacing the current Legacy software. An example of the current Legacy software would be GIC – General Inventory Catalog, and WIMS – Warehouse Inventory Management System.

Course Description

This course is designed to introduce Inventory Management Specialists to the new PassPort Business System and the processes necessary to perform all warehouse functions in PassPort. This course is to provides Inventory Management Specialists an overview of the system basics, material requests, the replenishment system, the overall warehouse process, quality control, and the reporting/analysis tools necessary to perform inventory management in conjunction with the Hanford Business Structure (HBS) supporting the Hanford Mission.

Audience

Core users responsible for maintenance of the spare parts convenience storage and the general supplies inventories.

Classroom Resources and Planning

Time: ~ 64 Hours/8 Days

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities.

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PassPort Student Workbook

evision	Author	Date	Comments

COURSE: INV-002
PASSPORT INVENTORY MANAGEMENT FOR WAREHOUSE
PERSONNEL, REV. 1

Purpose Statement

The purpose of this course is to provide Warehouse Personnel with the necessary skills to perform inventory management-specific job functions in accordance with the new reengineered business processes and the new software system replacing the current Legacy software. An example of the current Legacy software would be GIC – General Inventory Catalog, and WIMS – Warehouse Inventory Management System.

Course Description

This course is designed to familiarize warehouse personnel to the new PassPort Business System and the processes necessary to perform all warehouse functions in PassPort. This course is to provide warehouse personnel with an overview of: the system basics, the warehouse receiving process, the overall warehouse distribution system, and all reporting/analysis tools necessary to perform warehouse management in conjunction with the Hanford Business Structure (HBS) supporting the Hanford Mission.

Audience

Core users responsible for the physical control of items stored in controlled warehouse facilities.

Classroom Resources and Planning

Time: ~ 40 Hours/5 Days

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities.

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PassPort Student Workbook

Revision	Author	Date	Comments

COURSE: INV-003
PASSPORT INVENTORY MANAGEMENT FOR QUALITY
CONTROL RECEIVING INSPECTORS, REV. 1

Purpose Statement

The purpose of this course is to provide Quality Control Personnel with the necessary skills to perform inventory management specific job functions in accordance with the new reengineered business processes and the new software system replacing the current Legacy software. An example of the current Legacy software would be WIMS - Warehouse Inventory Management System.

Course Description

This course is designed to familiarize Quality Control Receiving Inspectors to the new PassPort Business System and the processes necessary to maintain strict quality control of incoming materials from within PassPort. This course is to provide Quality Control Receiving Inspectors an overview of: the system basics, material requisitions, the receiving process, quality control inspections, and the reporting/analysis tools necessary to maintain stringent quality control standards of incoming materials in conjunction with the Hanford Business Structure (HBS) supporting the Hanford Mission.

Audience

Quality control personnel responsible for performing receipt inspection on all incoming material shipments that require quality control overview.

Classroom Resources and Planning

Time: ~ 32 Hours/4 Days

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities.

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PassPort Student Workbook

Revision	Author	Date	Comments

COURSE: INV-004
PASSPORT INVENTORY MANAGEMENT FOR CHEMICAL
INVENTORY MANAGEMENT SPECIALISTS
REVISION NUMBER 1.0

Purpose Statement

The purpose of this course is to provide Chemical Inventory Management personnel with the necessary skills to perform chemical inventory management specific job functions in accordance with the new reengineered business processes and the new software system replacing the current Legacy software. An example of the current Legacy software would be WIMS – Warehouse Inventory Management System.

Course Description

This course is designed to introduce Chemical Inventory Management Specialists to the new PassPort Business System and the processes necessary to perform all warehouse functions in PassPort. This course is to provide Chemical Inventory Management Specialists with an overview of the system basics, material requests, the replenishment system, the overall warehouse process, quality control, and the reporting/analysis tools necessary to perform chemical inventory management in conjunction with the Hanford Business Structure (HBS) supporting the Hanford Mission.

Audience

Core users responsible for the receiving of chemicals and the maintenance and reporting of chemical inventories.

Classroom Resources and Planning

Time: ~ 56 Hours/ 7 Days

Methods: Lecture and discussion, guided tours through system, hands-on/ self-paced activities.

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PassPort Student Workbook

Revision	Author	Date	Comments

COURSE: GEN-001
PASSPORT PURCHASING WORKSHOP FOR OFFICE
SUPPORT, REV. 1

Purpose Statement

The purpose of this course is to provide Office Support Personnel with the necessary skills to perform purchasing specific job functions in accordance with the new reengineered business processes and the new software system replacing the current Legacy software. An example of the current Legacy software would be WIMS – Warehouse Inventory Management System, and HIPS - Hanford Inventory Program.

Course Description

This course is designed to introduce to office support personnel sitewide the new PassPort Business System and the processes necessary to generate a purchase requisition in PassPort. This course is to provide office support personnel with an overview of the system basics, purchase requisitions, and an introduction to the Hanford Business Structure (HBS), MSDS viewing, and AAA's. This lesson covers the basic requirements for generating a purchase requisition in accordance with the Hanford Business Structure.

Audience

An individual who, on an infrequent basis, orders catalog items, and parts. Includes the ability to locate and status open orders. A typical electronic order entry person, secretary, clerk, maintenance engineer, etc.

Classroom Resources and Planning

Time: ~ 4 Hours / .5 Days

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PassPort Student Workbook

Revision	Author	Date	Comments

COURSE: PUR-001
PASSPORT PURCHASING WORKSHOP FOR
REQUISITIONERS, REV. 1

Purpose Statement

The purpose of this course is to provide Requisitioners with the necessary skills to perform purchasing specific job functions in accordance with the new reengineered business processes and the new software system replacing the current Legacy software. An example of the current Legacy software would be WIMS – Warehouse Inventory Management System, and HIPS – Hanford Inventory Program.

Course Description

This course is designed to familiarize Requisitioners with the new PassPort Business System and the processes necessary to perform purchasing functions in PassPort. This course is to provide Requisitioners with an overview of: the system basics, vendor information, purchase requisitions, revision of purchase requisitions, and the reporting/analysis tools necessary to perform effectively in conjunction with the Hanford Business Structure (HBS) supporting the Hanford Mission.

Audience

Power user who orders catalog and non-catalog items, enters requisitions, statuses orders, obtains reports, communicates with purchasing and accounting regarding specifications, changes, and payments.

Classroom Resources and Planning

Time: ~ 4 Hours / .5 Days

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities.

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PassPort Student Workbook

Revision	Author	Date	Comments

COURSE: PUR-002
**PASSPORT PURCHASING WORKSHOP FOR APPROVING &
REVIEWING MANAGEMENT, REV. 1**

Purpose Statement

The purpose of this course is to provide Approving & Reviewing Management Personnel with the necessary skills to perform purchasing specific job functions in accordance with the new reengineered business processes and the new software system replacing the current Legacy software. An example of the current Legacy software would be PIDS – Purchasing Info Document System.

Course Description

This course is designed to introduce to sitewide Management the new PassPort Business System and the processes necessary to approve, review, and report from PassPort. This course is to provide Reviewing & Approving Management with an overview of the system basics, purchase requisitions, purchase awards, and all the reporting/analysis tools necessary to manage purchases in conjunction with the Hanford Business Structure (HBS) supporting the Hanford mission.

Audience

Most management in the PHMC, who have management signature authority to approve requisitions, authorizes sole sources, review open workloads, and trace expenditures.

Classroom Resources and Planning

Time: ~ 4 Hours / .5 Days

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PassPort Student Workbook

Revision	Author	Date	Comments

COURSE: PUR-003
PASSPORT PURCHASING WORKSHOP FOR
BUYERS, REV. 1

Purpose Statement

The purpose of this course is to provide Buyers with the necessary skills to perform purchasing specific job functions in accordance with the new reengineered business processes and the new software system replacing the current Legacy software. An example of the current Legacy software would be PIDS – Purchasing Info Document System.

Course Description

This course is designed to familiarize Buyers with the new PassPort Business System and all the processes necessary to perform all purchasing functions in PassPort. This course is to provide Buyers with an overview of: the system basics, vendor information, purchase requisitions, purchase orders, expediting, revisions and cancellations of purchase orders, the overall buying process, and the reporting/analysis tools necessary to perform the function of Buyer in conjunction with the Hanford Business Structure supporting the Hanford Mission.

Audience

Buyers, and Purchasing Clerks who enter orders, process requisitions, make payments, and obtain reports, etc. Power users of all purchasing functions.

Classroom Resources and Planning

Time: ~ 40 Hours/5 days

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities.

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PassPort Student Workbook

Revision	Author	Date	Comments

COURSE: PUR-004
PASSPORT PURCHASING WORKSHOP FOR CONTRACT
ADMINISTRATORS, REV. 1

Purpose Statement

The purpose of this course is to provide Contract Administration Personnel with the necessary skills to perform purchasing specific job functions in accordance with the new reengineered business processes and the new software system replacing the current Legacy software. An example of the current Legacy software PIDS – Purchasing Info Document System.

Course Description

This course is designed to introduce to Contract Administrators the new PassPort Business System and the processes necessary to generate a purchase requisition in PassPort. This course is to provide Contract Administrators with an overview of the system basics, vendor evaluations, purchase requisitions, and an introduction to the Hanford Business Structure (HBS.) This lesson covers the basic requirements for generating a purchase requisition in accordance with the Hanford Business Structure.

Audience

Buyers and Purchasing Clerks who also need to create and pay contracts. Power users of all contract functions and some purchasing functions.

Classroom Resources and Planning

Time: ~ 4 Hours / .5 Days

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PassPort Student Workbook

Revision	Author	Date	Comments

COURSE: PUR-005
PASSPORT PURCHASING WORKSHOP FOR BUYER
TECHNICAL REPRESENTATIVES, REV. 1

Purpose Statement

The purpose of this course is to provide Buyer technical Representatives with the necessary skills to perform purchasing specific job functions in accordance with the new reengineered business processes and the new software system replacing the current Legacy software. An example of the current Legacy software would be PIDS – Purchasing Info Document System.

Course Description

This course is designed to introduce to Buyer Technical Representatives, sitewide, the new PassPort Business System and the processes necessary to generate a purchase requisition in PassPort. This course is to provide Buyer Technical Representatives with an overview of the system basics, purchase requisitions, and an introduction to the Hanford Business Structure (HBS) This lesson covers the basic requirements for generating a purchase requisition in accordance with the Hanford Business Structure.

Audience

Primarily field personnel who will be reviewing statements of work, writing contract requisitions, and reviewing payment authorizations.

Classroom Resources and Planning

Time: ~ 4 Hours / .5 Days

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities.

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PassPort Student Workbook

Revision	Author	Date	Comments

COURSE: BEN-001
PEOPLESFT BENEFITS ADIMINISTRATION
REV. 1

Purpose Statement

The purpose of this course is to provide Benefits Administration trainees with the necessary skills to perform benefits administration job functions in accordance with the new reengineered business processes and the new PeopleSoft software system replacing the current software.

Course Description

This course is designed to familiarize benefits administration personnel to the new PeopleSoft Business System and the processes necessary to perform all benefits administration tasks in PeopleSoft. This course is to provide benefits administration personnel with an ability to define eligibility rules based on factors such as age, status, employee type, length of service, company, and pay group. Also creates employee communications such as enrollment forms and confirmation letters. You will learn the system's automated processes for enrolling employees into benefits plans, changing elections, and coverages based on life or job status changes in conjunction with the Hanford Business Structure (HBS) supporting the Hanford Mission.

Audience

Project team members as well as human resources, benefits and payroll staff responsible for defining benefits processes and procedures. Training staff responsible for teaching personnel to use PeopleSoft Benefits Administration.

Classroom Resources and Planning

Time: ~ 32 Hours/4 Days

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities.

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PeopleSoft Student Workbook

The course described is an EXTERNALLY taught course. Courses have been completed prior to July 1, 1998.

COURSE: PAY-001
PEOPLESOFT PAYROLL
REV. 1

Purpose Statement

The purpose of this course is to provide Payroll trainees with the necessary skills to perform Payroll functions in accordance with the new PeopleSoft software system replacing the current software.

Course Description

This course is designed to familiarize Payroll personnel with PeopleSoft Payroll which can help control payroll cycle-if you use the system effectively. Discovering the ins and outs of this robust payroll solution and how to set up and maintain payroll tables, implement earnings and deductions, arrears processing, tax rates, garnishments, and other payroll adjustments. Exime and update a PeopleSoft Payroll pay sheet. And through calculating and confirming several payroll cycles, gain confidence in troubleshooting abilities in conjunction with the Hanford Business Structure (HBS) supporting the Hanford Mission.

Audience

Project team members as well as human resources, benefits, and payroll staff responsible for defining payroll processes and procedures. Training staff responsible for teaching personnel to use PeopleSoft Payroll.

Classroom Resources and Planning

Time: ~ 32 Hours/4 Days

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities.

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PeopleSoft Student Workbook

The course described is an **EXTERNALLY** taught course. Course was completed prior to July 1, 1998.

COURSE: HR-001
PEOPLESFT HRMS TRAINING CLASS FOR FEDERAL
CUSTOMERS, REV. 1

Purpose Statement

The purpose of this course is to provide Federal Human Resources trainees with the necessary skills to perform Federal Human Resources job functions in accordance with the new reengineered HRMS and the new PeopleSoft software system replacing the current software.

Course Description

This course is designed to familiarize Federal Human Resources personnel to the new PeopleSoft HRMS and the processes necessary to perform all HRMS tasks in PeopleSoft. This course is to provide HRMS personnel with an ability to enter, change, maintain, and retrieve personnel information and generate reports. You analyze the the table relationships that support personnel information, find out how the system, such as security, payroll, or benefits administration. You will review how to manage employee performance, monitor labor relations, and address health and safety concerns in conjunction with the Hanford Business Structure (HBS) supporting the Hanford Mission.

Audience

Project team members, application specialists responsible for defining processes and procedures, and training staff responsible for teaching personnel to use PeopleSoft Federal human Resources.

Classroom Resources and Planning

Time: ~ 32 Hours/4 Days

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities.

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PeopleSoft Student Workbook

The course described is an EXTERNALLY taught course. Course was completed prior to July 1, 1998.

COURSE: MSDS - 001
PASSPORT MSDS ADMINISTRATION
AND REGULATORY REPORTING
REV. 1

Purpose Statement

The purpose of this course is to provide Material Safety Data Sheet (MSDS) administration and regulatory reporting trainees with the necessary skills to perform MSDS administrative and regulatory reporting functions in accordance with the new PassPort software system replacing the current software.

Course Description

This course is designed to familiarize MSDS administration and regulatory reporting personnel with PassPort MSDS software which can help with material analysis to ensure consistency in specifying when a MSDS is required. PassPort includes the tracking, providing access to MSDS data, associate corporate procedures with specific MSDS sections, collection of inventory data associated with reportable chemicals, and archiving of MSDS forms for long term storage and retrieval in conjunction with the Hanford Business Structure (HBS) supporting the Hanford Mission.

Audience

Project team members as well as administration and regulatory reporting personnel for defining MSDS processes and procedures. Training staff responsible for teaching personnel to use PassPort MSDS system.

Classroom Resources and Planning

Time: ~ 24 Hours/ 3 Days

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities.

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PassPort Student Workbook

The course described is an EXTERNALLY taught course.

COURSE: PC - 001
PROJECTS COSTING
REV. 1

Purpose Statement

The purpose of this course is to provide Projects Costing reporting trainees with the necessary skills to perform Projects Costing reporting functions in accordance with the new PeopleSoft software system replacing the current software.

Course Description

This course is designed to familiarize Projects Costing reporting personnel with PeopleSoft software helping you accumulate all of your cost – by using the system effectively. You will learn how to define Project Costing controls, create project trees, add resources and activities, accumulate cost, analyze projects, and bill for project costs. Also included are mass change capabilities, allocations, flexible formulas, and asset creation. This software will work in conjunction with the Hanford Business Structure (HBS) supporting the Hanford Mission.

Audience

Project team members as well Projects Cost staff responsible for defining process and procedures, and training staff responsible for teaching personnel to use PeopleSoft software.

Classroom Resources and Planning

Time: ~ 32 Hours/ 4 Days

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities.

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PeopleSoft Student Workbook

The course described is an EXTERNALLY taught course. Course was completed prior to June 1, 1998.

COURSE: GL - 001
GENERAL LEDGER REPORTING
REV. 1

Purpose Statement

The purpose of this course is to provide General Ledger reporting trainees with the necessary skills to perform General Ledger reporting functions in accordance with the new PeopleSoft software system replacing the current software.

Course Description

This course is designed to familiarize General Ledger reporting personnel with PeopleSoft software helping you process and report on financial transactions. Discover how to create and use business units, define ledgers and calendars, enter and post journal entries to a ledger, and close year-end books. You will become familiar with nVision a powerful reporting and analysis tool to use in conjunction with the Hanford Business Structure (HBS) supporting the Hanford Mission.

Audience

Project team members as well Projects Cost staff responsible for defining process and procedures, and training staff responsible for teaching personnel to use PeopleSoft software.

Classroom Resources and Planning

Time: ~ 32 Hours/ 4 Days

Methods: Lecture and discussion, guided tours through system, hands-on/self-paced activities.

Equipment: Workstation, InFocus, Student Folders, and Handouts

References: Indus International PeopleSoft Student Workbook

The course described is an EXTERNALLY taught course. Course was completed prior to June 1, 1998.

COURSE NO: FIN-001
FY 1999 STARTUP WORKSHOP, REV. 1

Purpose Statement

To provide the detailed information project control/financial staff and management need for fiscal year end/start-up.

Description

These sessions should help all project control/financial management and staff on how to *apply* the new set of business practices, as previously shared in Business Practice Change Orientations and via other communication methods. In other words, the sessions should help move staff from the understanding of concepts to applying them. Topics covered will cross organizational boundaries such as Finance, Planning, Acquisitions, and Contracts. As an example, see *last* year's topics listed below. This year's should be similar, but take into account new system impacts.

- Setting Up Work Orders (incoming and outgoing)
- Planning/Budgeting for Home Office Support
- Rate Changes
- Planning/Budgeting for Enterprise Company Work
- Request for Service (RFS) Process
- Capital Accounting
- Accrual Process
- New RL WBS
- HANDI
- P3 Conversion
- Reference Materials
- Question & Answer

Audience

Project control/financial management and staff who are involved with the control, monitoring, and reporting of budget, performance, and cost of projects.

Classroom Resources and Planning

Time: ~3 Hrs

Methods: Lecture and discussion

Equipment: Handouts, PowerPoint Presentation w/LCD projector, laptop

References: N/A

NOTE: It is anticipated at least four of these workshops will be held, both in the outer areas and downtown.

COURSE NO: FIN-002
PROJECT DATA CONTROL, REV. 1

Purpose Statement

To inform and instruct project control/financial management and staff on utilizing the HANDI 2000 reporting tools at their disposal.

Description

This course will provide an overview/reminder of business practice, coding structure, and terminology changes, but will focus on the reporting tools available beginning 10/1/98. It will cover the reporting capabilities available, what kind of information is housed where, how to access the information and navigate in the various reporting tools, as well as how to download/export data to products such as Excel. The course will also provide points of contact and other resources for additional information. NOTE: Recognizing the overall reporting infrastructure is still being worked, it is anticipated "reporting tools" may include, but not be limited to, HANDI and the Soft Reporting replacement.

Audience

Project control/financial management and staff who are involved with the control, monitoring, and reporting of budget, performance, and cost of projects. It is also targeted to personnel involved in supporting the aforementioned project control/financial management and staff in finding information and running reports even if "project control/finance" is not their primary job function. This course is *not* intended to cover interpretation of report data, or advanced skills in researching problem records/transactions (see Course No. FIN-003).

Classroom Resources and Planning

Time: ~ 4 Hrs

Methods: Lecture, discussion, and computer demonstration,

Equipment: Computer classroom w/computer for instructor, large monitor display or LCD projector, flip chart, student handouts.

References: N/A

Pre-Requisite: This course will be a pre-req for Course No. FIN-003. NOTE: This course replaces # 005005, FDS Overview & Soft Reporting.

COURSE NO: FIN-003
PROJECT DATA CONTROL, REV. 1

Purpose Statement

To inform and instruct project control/financial management and staff on utilizing the HANDI 2000 reporting tools at their disposal.

Description

This course will provide an overview /reminder of business practice, coding structure, and terminology changes, but will focus on the reporting tools available beginning 10/1/98. It will cover the reporting capabilities available, what kind of information is housed where, how to access the information and navigate in the various reporting tools, as well as how to download/export data to products such as Excel. The course will also provide points of contact and other resources for additional information.

NOTE: Recognizing the overall reporting infrastructure is still being worked, it is anticipated "reporting tools" may include, but not be limited to, HANDI and the Soft Reporting replacement.

Audience

Project control/financial management and staff who are involved with the control, monitoring, and reporting of budget, performance, and cost of projects. It is also targeted to personnel involved in supporting the aforementioned project control/financial management and staff in finding information and running reports even if "project control/finance" is not their primary job function. This course is intended to cover interpretation of report data, and advanced skills in researching problem records/transactions.

Classroom Resources and Planning

Time: ~ 4 Hrs

Methods: Lecture, discussion, and hands-on computer practices.

Equipment: Computer classroom w/computer for instructor, large monitor display or LCD projector, flip chart, student handouts.

References: N/A

Pre-Requisite: The course which will be a pre-req for this is Course No. FIN-002.

NOTE: This course is for advanced reporting practices.

COURSES COMPLETED

TECHNICAL & ADMINISTRATIVE

1. People Projects Module Training
2. SA100 System Administration and Financial Infrastructure
3. C1102 Architecture and Applications Support
4. C1104 Data Services Workbench
5. CS101 Client Implementation and Support
6. CS201 Passport Installation Basics
7. CS202 Passport Operations Support
8. People Tools I
9. People Tools II
10. People Code
11. SQL/SQR for PeopleSoft
12. Data Management Tools
13. Configuration and Administration
14. SQA Testing Tools
15. P/S nVision using Queries
16. Process Scheduler
17. App/Eng/Mass Change
18. Query Basics
19. Query Advanced
20. Crystal Advanced
21. HP-UX 10.x System and Network Administration for UNIX System Administration
22. Logical Volume Manager and MirrorDisk/UX
23. MC/ServiceGuard
24. HP-UX Operating System Security
25. HP-UX Performance & Tuning
26. P3
27. PERF

COMPUTER BASED TRAINING COURSES

CURRENTLY AVAILABLE AND COMING SOON

Information concerning additional CBT courses can be found on the HANDI 2000 Web Site

Continue to watch the Web Site for additional CBT announcements and updates

- Portal 97
- Soft Reporting
- Budget Reporting Training Classes on re-occurring basis throughout the year to review and update